

Suwanee Money Honeys Investment Club

2021 Newsletter

Education and Training Topics

www.smhic.org

Published January 2022



Investing

2021 - Topics Covered in Training per Quarter

Partners, unlike other investment clubs, here at SMHIC our purpose is not only to invest and make money together, but more importantly to learn the foundation of investing. As we close out our first year of learning and investing together, it is important that we look back at what we've covered and achieved together. Each of you have put in your hard earned money, your time in learning and researching to select stocks to invest in. Each of you should be proud of what we've achieved. Below are the topics we covered each quarter in 2021.

Make Money

First Quarter (Module 1)



- What are stocks?
- Common Stocks vs Preferred Stocks
- Initial Public Offerings
- IPO / Exchanges / Indices
- What causes stock prices to change
- Ticker Symbols
- Certificate of Deposit
- Money Market Accounts/Mutual Funds
- 401(k) or 403(b)
- Roth IRAs
- Low-Cost index Funds
- Target-Date Funds



Second Quarter (Module 1 cont')



- Income Statement
- Balance Sheet
- Cash Flow
- P/E, P/E Ratio
- Low P/E, High P/E
- How to Calculate P/E
- Benefits of P/E
- Current Ratio (mrq)
- Book Value Per Share (mrq)
- Total Cash (mrq)
- Total Cash Per Share (mrq)
- Total Debt (mrq)
- Total Debt/Equity (mrq)
- Cash Flow Statement

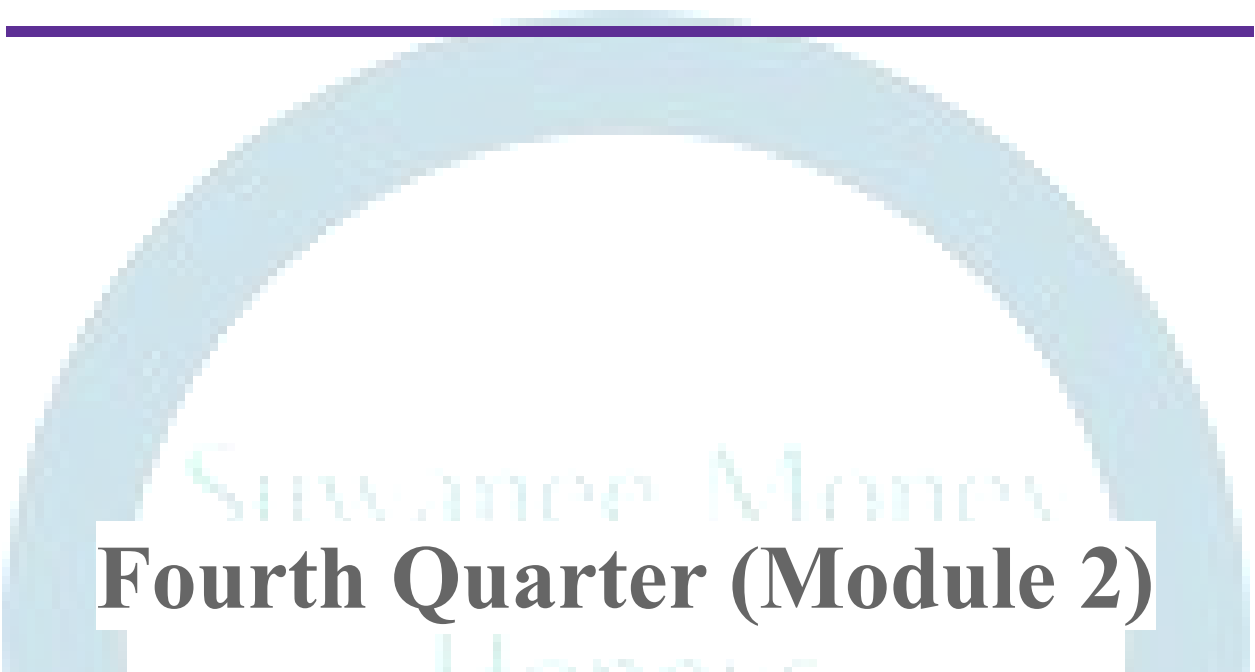


- Operating Cash Flow
- Levered Free Cash Flow (ttm)
- Exchange-Traded Funds(ETFs)

Third Quarter (Module 1 cont')



- Market Cap (intraday)
- Enterprise Value
- Trailing P/E
- Forward P/E
- PEG Ratio (5 yr expected)
- Price/Book (mrq)
- Enterprise Value/Revenue
- Enterprise Value/EBITDA



Fourth Quarter (Module 2)



- INVESTMENT BASICS
 - What is investing
 - Investing vs Gambling
 - What is a stock market
 - What is a Certificate of Deposit(CD)
 - What are Mutual Funds
 - Exchange-Traded Funds(ETFs)
- EXCHANGES
 - New York Stock Exchange (NYSE)



- Nasdaq
- Over-The-Counter(OTC) (fewer regulations, less transparent comparing to other exchanges, no market maker)
- Chicago Board Options Exchange (CBOE)
- TYPES OF MARKETS
 - Money Markets
 - Capital Market
 - Primary Market
 - Secondary Market

